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# INTRODUCTION

With hundreds of software platforms to choose from, entering the market for a new learning management system can be a daunting experience. And getting it wrong is painful. A third of organisations are dissatisfied with their current LMS (eLearning Guild 2013), while 21% of organisations are not using any LMS at all (Towards Maturity 2015). So it's likely that you're either looking for a new LMS or are thinking about adopting one for the first time.

Choosing an LMS is an important and strategic decision, and making the wrong choice can be very costly both in terms of budget spent and time committed. So it's crucial that you adopt a selection strategy that will guide you to the system best suited to your organisation.





## Where to start?

Instead of diving in and comparing lists of what can look like virtually identical features, it's much wiser to take a step back and identify your business requirements. Our five questions below will get you thinking about your broader needs before you begin to narrow down your requirements.

"It's too easy to get distracted by the 'shiny lights and gadgets' rather than what is really important for your new LMS to make a difference in your organisation."

*Robert Schaefer, Senior Manager of Learning and Information Technology at Raytheon*

"Organisations need to start by considering the business objectives that an LMS is going to support. This may be onboarding people faster and more consistently, supporting a change programme or new products. Most importantly organisations can think through the outcomes they want to achieve such as reducing staff attrition, standardising processes, reducing costs, improving access to training and so on."

*Paul McElvaney, CEO at Learning Pool*

Are we ready to do this?

"Many organisations launch into the search for a Learning Management System before ensuring they have the resources and infrastructure to support the implementation. This often results in a more time consuming, more costly LMS installation that isn't entirely fit for purpose."

*Meredith Henson, Solutions Manager, Mind Click*

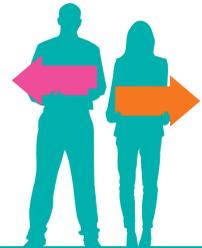
# 1.



## Who wants what?

Many organisations make the mistake of immediately entering into a feature-by-feature showdown of learning management systems. However, this doesn't take your own needs into account - it's all very well knowing that one LMS has a feature that another doesn't, but:

- Will your people actually use that functionality?
- Can your IT infrastructure support it?
- Will it integrate with your other systems?



“LMS projects can often touch on all parts of an organisation, and in our experience, the most successful LMS implementations are the ones where diverse stakeholders have been engaged, kept in the loop along the way, and where they have had some involvement in the initial gathering of requirements right through to testing and rollout.”

*Stephen Foy, Solutions Consultant, City & Guilds Kineo*



Instead of looking outwards at the products on offer, start with looking inwards at your organisation and its people. There are several key stakeholder groups to consider here:

1

**End users** - Too often overlooked, but should always be top of your list. If your organisation is currently sitting within the 33% that are dissatisfied with their current LMS implementation, ask your learners why they're not engaging or using it to its full advantage. Is the content not relevant? Is it hard to navigate? Are there technical issues? Understanding your learners can spell the difference between a successful and an unsuccessful LMS.

Meredith Henson said: "While it seems obvious to involve individuals who use the current system the most or who are the loudest supporters of the LMS project, it is just as important to speak to the individuals who use the current system the least or are the loudest opponents of the LMS implementation project. The perspective and objections of this user group will guide you on the obstacles your organisation is likely to encounter during the course of the project and allow you time to address and mitigate these early on."

2

**IT/IS Department** - Your IT team will care about factors such as robustness, security, interoperability, support and technical specifications.



3

**Learning designers** - Whether your learning design expertise is inside your team or outside with vendors, make sure you know what your learning designers need from an LMS. Also, keep them involved in the process so you can benefit from their ability to leverage available features - a vital skill when selecting a new LMS.

4

**Managers** - They will need to track progress, monitor completion rates or control access, so ensure you know how they will interact with the LMS so that it supports their everyday workflow, rather than hinders it.

Robert Schaefer said: *“Upper management support is critical to gain, otherwise companies implement new systems, don’t follow any governance, and don’t have any buy-in.”*

5

**Administrators** - Who will be responsible for managing the LMS once up and running? It’s often their satisfaction and ability to drive the system efficiently that makes the biggest difference to productivity and performance improvement.



6

**Sales team** - They may want specific features such as leaderboards, to see resources at team levels, and be interested in using the system for extended audiences (partners, resellers, customers) beyond your immediate staff base.

7

**Leadership** - Leaders may request a more resource-based approach and the ability to support fully blended programmes that incorporate peer-to-peer informal learning alongside formal activities.

8

**Compliance team** - They are likely to want role-based assignment of content and a granular level of reporting with robust certification of completion of mandatory, regulatory training.

Jason Miller, Director of Business Development at Synegen, said: *“For internal compliance training, Legal and/or HR are typically key stakeholders. For employee development, HR and Managers. For those offering training as a service or monetizing their content, it is oftentimes the business side and the demands of the learner market that drives LMS functionality and the learner experience to be provided.”*



**Marketing** - They will be able to help with the branding and look and feel of the LMS, as well as any internal marketing communications campaign that is essential to a successful launch.

*Stephen Foy of City & Guilds Kineo* said: “Talk to corporate comms and marketing! As experts in designing for specific target audiences, at the basic level, they can help you ensure that your learning platform is on brand, and how to make the platform really speak to people in the organisation, delight them and draw them back, time and time again.”

## TIP:

Think carefully in terms of the use cases you want to support rather than drawing up a feature wishlist. This will help you to receive more creative and useful responses from vendors, which may stretch beyond a standard formal LMS provision. Reading case studies of how others have solved their learning management challenges can be helpful here.

## THINK OPEN SOURCE:

Open source IT solutions have a huge strategic advantage for all organisations, minimising licence fees so you can control costs more effectively. It's likely that you're using open source elsewhere in your business, so it is time to bring that benefit to the LMS budget too.

## 2.

# How much flexibility do we want?



The next question to ask yourselves is how much control you want. For some organisations, a simplified, pre-configured setup is sufficient, whereas others will need a far greater degree of control over everything from branding, the user interface design and the form of ongoing support required.

There are several factors to consider in terms of control:

- Branding - Does your LMS need to suit your look and feel, or is a 'vanilla', unbranded product acceptable?
- Blend design - What range of blended learning design and activities does your LMS need to support?
- User experience - Do you need to customise by role, remember preferences or personalise learning intelligently based on previous interactions with your LMS?
- Device independence - Which devices will your learners be using, and how many of these must your LMS support?
- Cost - How will you ensure you are only paying for features you will actually use?
- Supporting the whole learning experience - Do you also need to consider an informal, social learning approach? If so, should this be tightly integrated with your LMS (like Totara Social) or operate alongside existing established systems?





## TIP:

Consider creating a MoSCoW (Must have, Should Have, Could Have, Won't Have) spreadsheet to ensure you're clear on your priorities, but avoid generating a vendor scorecard based purely on features - these matter less than flexibility and service.

You can find a MoSCoW template at the end of this guide. Feel free to complete it and send it to us for analysis and feedback from one of our experts.



## EXPERT TIP:

Mind Click's Meredith Henson suggests considering the four Ss:

**Stability** - is the LMS stable and reliable, and are updates tested thoroughly prior to release?

**Security** - does the LMS see regular security updates, and what is the LMS's approach to security?

**Scalability** - will it support all of our learners and projected growth in learner numbers?

**Sustainability** - does the LMS support the addition of new features? Can these features be switched on/off as required?

“Seamlessness of the learner experience is also an important consideration, especially when building true blended designs that incorporate both formal and informal elements. Being able to present learning opportunities within the workflow significantly increases the impact and effective transfer of new skills and behaviours. To facilitate this transparency the LMS should enable seamless integration with current systems.”

*Lars Hyland, Totara Learning*



## THINK OPEN SOURCE:

While the LMS you choose may suit your needs now, how do you know it will in the future? To keep up with the rapidly changing learning technologies market, it could be worth considering an open source LMS. As you identify new requirements, you have more options available to you to expand functionality in a supported way through contributions to the open source community, and so have more direct influence over the future path of the product.



“I always relate selecting a new learning system to selecting a new vehicle. How the family or personal vehicle will be used will make a big difference. Sports car? Truck? SUV? All can be the right vehicle based upon the features needed.

When it comes to selecting a new LMS, much depends upon the company’s past experience. Is it the company’s first LMS or sixth generation they are looking for? Already having an LMS in the company should help in identifying the important features and also what is lacking from their current system. It’s best to start with major requirement categories, fill those out with the help of the key decision makers (which builds alignment and commitment) and then start the search.”

*Robert Schaefer, Raytheon*



### 3.

## Will this platform grow with our needs?

Although you may know what you need from an LMS right now, you can't predict the future. This means there are a few things to consider while you're selecting your platform:

#### 1. Can you easily scale user levels as you need to?

Consider future developments - you may go on a recruitment drive, or open a new office, or acquire a new company, or decide to open your learning to a new group. Ensuring your LMS is technically and economically scalable will save you a major headache further down the line.

#### 2. Can you extend outside your organisation?

If you decide to open up your LMS to partners, suppliers, end customers or any audience outside your organisation, you will need an LMS that can reach them. You may also wish to keep some groups separate within this LMS - for instance, resellers who are also competitors.

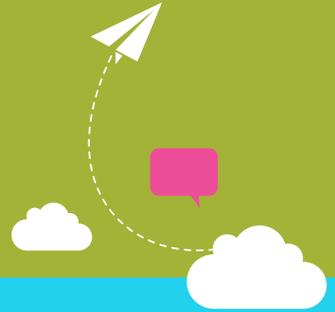
#### 3. What new features might become available?

Your needs aren't going to stand still. Will your LMS provider keep updating their LMS to take into account learning and technology innovations, for example the integration of social learning or use



Many organisations launch into the search for a Learning Management System before ensuring they have the resources and infrastructure to support the implementation. This often results in a more time consuming, more costly LMS installation that isn't entirely fit for purpose.

*Meredith Henson, Mind Click*



## GET YOUR HEAD IN THE CLOUD

You may be interested in an LMS, but are not currently in a position to invest in a fully supported solution. For instance, you may be a growing organisation, or a corporate change agent looking for a flexible solution, or you may even want to run a pilot scheme on a smaller scale before you commit to a full implementation.

The 'open SaaS' model in the cloud can be a great way to get started with an LMS without the expense of a full-scale commitment. The flexibility, speed and lower cost of getting set up can be an attractive prospect to many organisations while leaving the option open to bring the system in-house or move to alternative hosting support.

The open SaaS cloud model offers the best of all worlds.

Solutions like Totara Cloud can help you achieve these benefits, as well as making it very easy to upgrade when you're ready for a fully supported solution like Totara LMS. Totara Cloud comprises all the essential features you need to get up and running, and is quick to set up so you can get started right away.

### TIP:

Don't get tied into a purely cloud-based vendor, which can prove to be just as inflexible as an enterprise solution. Open source is the best choice if you want retain control and have more influence over the long-term development of your platform.





## TIP:

To accommodate future developments, you should assume you will need 2x or 3x the budget for your current requirements. Make sure you do the maths, and be clear how your budget can grow in line with business requirements when you speak to vendors.



## EXPERT TIP:

If you're thinking about expanding your LMS, Paul McElvaney from Learning Pool suggests thinking about the following areas to ensure the process goes as smoothly as possible:

- What format is data in and will it need to be cleansed
- Be clear on systems integration required
- How many staff can you dedicate to the project. Don't underestimate the size of the team you will need to create, administrate and support
- Get all the right stakeholders on board, particularly IT and communications
- What might cause a delay on implementation. Be realistic about timeframes as delays on your side will add costs to the project





## THINK OPEN SOURCE:

Opting for an open source LMS means you have more control over the future of your platform. Not being tied in to your vendor's desire to grow the features they want puts the power in your hands.

Totara Learning prides itself on its commitment to putting the customer at the heart of every decision we make. And the beauty of our open source network is that the experts and innovators across our community can collaborate to influence the roadmap of the product, giving LMS customers more control. Between Totara Learning, our global partner network and our community, we drive innovation faster and work together to create features and developments people actually want. This is the beauty of open source - it's fast, it's cost effective and it gives users the support of a wide network of learning and technology experts.



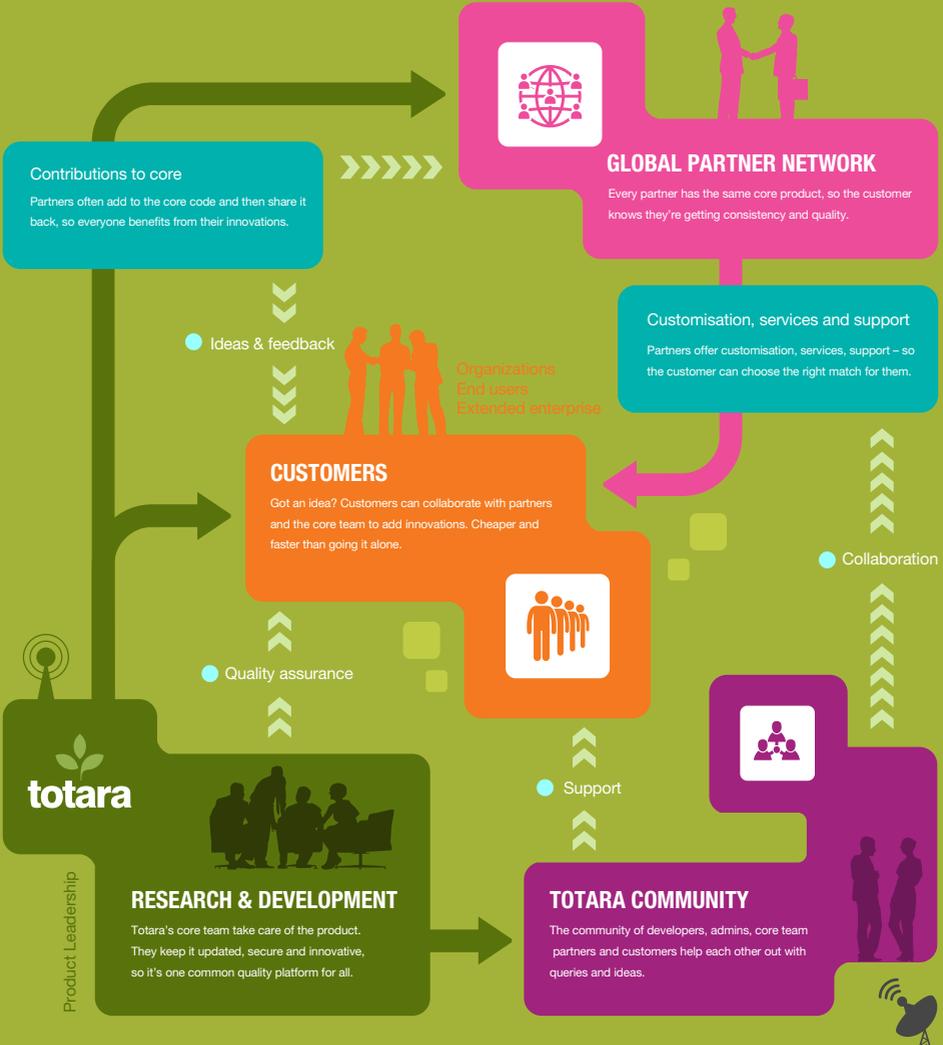
“With an open source ecosystem, the community members themselves provide a significant amount of research and development by contributing ideas and information on user priorities, problem solving, and in many cases actual code into the core product.

As participation and momentum builds around a software product, the rate of innovation accelerates and value is delivered to all participants.”

*Richard Wyles, CEO, Totara Learning*

# Totara's Innovation Network

Open Source networks put collaboration at the core. Here's how it benefits all the players – especially the customer - in the Totara model.



## 4.



# What if we change our minds?

While we can't foresee the future, we know that things will change over time - sometimes faster than we anticipate. That's why it's important to avoid getting locked into any single vendor or approach. When your company changes direction, you need to know that your LMS will support this move, making open source the ideal strategic solution.



## ASK THE EXPERTS - Why open source?:

"Remember one of the main benefits of the open source model is that clients can and do move partners, so make sure that you constantly review the service you're getting. Our customers love that they're in the driving seat with open source technology. It's all about giving the customer ultimate freedom and control with no vendor lock-in."

*Paul McElvaney, Learning Pool*

"Open source LMS provides a 'no compromise solution' in which technology becomes a derivative of client's business requirements, rather than being shoehorned into traditional off-the-shelf LMS functionality in which clients find themselves tethered to a vendor's product road map."

*Jason Miller, Synegen*



## TIP:

Avoid entering into long-term contracts that favour the vendor. The balance of control should always tip in your favour, giving you the option to take your LMS elsewhere if you are not happy.



## THINK OPEN SOURCE:

Opting for an open source platform like Totara LMS gives you a flexible, portable solution that can be moved from vendor to vendor or managed in-house, keeping you in control. The ease of switching means you won't get tied in with a vendor who no longer supports your requirements or does not offer the service you expect.





## 5.

# What are the main drivers: time, quality or cost?

Every organisation has a unique set of drivers for choosing the LMS they do, whether it's time, quality, cost or a combination of the three. Regardless of the reasons behind your choice, be clear about where you're starting from and how your LMS will help you get to where you need to be.

Understanding your primary drivers also equips you for honest conversations with vendors. If your current LMS is too expensive, or doesn't let you deliver learning quickly enough, ensure you make your reasons for wanting to change clear to your prospective vendors. Once they know your pain points, they will be in a better position to address your concerns and get to the point quicker.

“Everyone benefits from a more collaborative model. The customer receives more transparent value, choice, opportunities to collaborate, freedom to innovate, and business agility. For suppliers, multiple scalable business models are available throughout a successful open technology innovation network.”

*Richard Wyles, Totara Learning*



### THINK OPEN SOURCE:

The open source model supports time, quality and cost drivers. The collaborative community drives an innovation network that makes it faster to address new requirements and gives you the ability to add any features you need when you need them, avoiding expensive licence fees.

As well as this, it is also important to consider external factors when selecting your LMS. “The rate at which technology becomes obsolete coupled with the dynamic needs of today’s learner demand that organisations provide a flexible LMS solution,” said Jason Miller. The rate of change in your industry may be beyond your control, but the rate of change and innovation within your industry need not be with an open source approach where you can influence the roadmap.



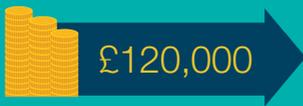
“Tesco saved themselves £1 million in their first year after implementing Totara LMS. BMI Healthcare saw their compliance rates improve by 50% over the same time period, freeing up considerable amounts of time for front-line services and back office administration.”

*Stephen Foy, City & Guilds Kineo*

## Implementing Totara LMS has led to:



... a 38% reduction in staff turnover for Jurys Inn



... savings of £120,000 compared to a proprietary LMS for East Lancashire Hospitals NHS Trust



... an increase in compliance of 50% for BMI Healthcare



... a 40% decrease in user complaints and support requests for the Australian Sports Anti-Doping Authority (ASADA)



... a learner satisfaction rate of over 90% for language-learning platform Edubreizh



... over 1,200 hours of administration time saved for Northumberland County Council



... a rapid six-week turnaround for Sussex Partnership NHS Foundation Trust



## So, what next?

“In an economic climate driven by ever more rapid technological change, the demands on your organisation to adapt and keep competitive will only increase. Maintaining the skills and performance of your employees and stakeholder community is critical to your business strategy. Investing in systems that can adapt with you, quickly and cost effectively keeps you in control and in the driving seat, and not at the mercy of one vendor.”

*Lars Hyland, Totara Learning*

We hope this guide has helped you to reflect more deeply about your current and planned LMS provision. The expert contributions from experienced practitioners and solutions providers can help you avoid many of the most damaging potholes on the road to selecting an LMS that is a genuine strategic asset for your organisation.

If you have further questions feel free to get in touch with us at Totara Learning - we are happy to help.

Good luck!

# Meet the experts



Meredith Henson, Solutions Manager, Mind Click



Paul McElvaney, CEO, Learning Pool



Jason Miller, Director of Business Development, Synegen



Robert Schaefer, Senior Manager of Learning and Information Technology, Raytheon



Stephen Foy, Solutions Consultant, City & Guilds Kineo



Richard Wyles, CEO, Totara Learning



Lars Hyland, Chief Commercial Officer, Totara Learning



# MoSCoW Prioritisation Template

You can type directly into the form below to work out your LMS priorities.

**Project Name:**

**Project Manager:**

**Project Description:**

**Limitations:**

|                      |                      |                      |
|----------------------|----------------------|----------------------|
| Time:                | Budget:              | Resource:            |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

**M(ust have):**

What must be delivered, i.e. it is essential for this phase?

**S(hould have):**

What should be delivered as a high priority but not essential?

**C(ould have):**

What could be delivered if there was available time/budget/resource?

**W(ould have):**

What would it have if time/budget/resource was unlimited?



Want a second opinion? Feel free to send your completed MoSCoW form to [enquiry@totallearning.com](mailto:enquiry@totallearning.com) for feedback and assistance from one of our Totara Learning experts.

# ABOUT TOTARA

Totara Learning is rapidly transforming the learning technology software market. Our products include the award-winning Totara LMS, a functionally rich learning management platform and Totara Social, an enterprise Social Learning Network designed to foster collaboration, communication and knowledge sharing.

Totara Learning products are open source, highly flexible and bring powerful freedoms to all organisations with formal and informal learning needs, both within the workplace and the extended enterprise. They are used by many industry sectors, including finance, retail, energy, health, government and not-for-profit organisations. Customers range from small to large multinational corporations – a testament to our innovation, robust versatility and scalability.

